Mission report

Subject	Coffee industry engagement
Place and dates	Campinas and Brasília, Brazil – 2 to 9 July 2025
ICO staff member	• Vanúsia Nogueira, Executive Director • Hannelore Beerlandt, Head of Operations
Purpose of travel	• Take part in the event "Conecta Agro Congress 2025" • Participate in the 10th Cecafé Coffee Dinner & Summit in Campinas, with a focus on EUDR implementation and political aspects. Participate in sessions on markets and in the side event on labour conditions • Conduct technical visits to coffee operations in Southern Minas Gerais • Hold institutional meetings with government and private sector entities.
Five-Year Action Plan/Programme of Activities relevance	**Five-Year Action Plan** • **Strategic Goal I**: Delivering world-class data, analysis and information to the industry and policymakers • **Strategic Goal II**: Using the Organization's convening power to provide a forum for dialogue between and within the public and private sectors • **Strategic Goal III:** Facilitating the development of projects and promotion programmes through public-private partnerships **Results and Deliverables from the PoA:** **Planned Result I.B: Positioning of the ICO as the world's most respected coffee statistical authority, enhanced and recognized through the elaboration and dissemination of relevant statistical data and economic analysis related to the global coffee sector and the global economy:** • I.B.7 Monitoring and assessing new regulations, standards and other stress factors affecting the coffee sector, engaging with regulators and coffee producers • I.B.9 Preparation of articles, presentations, interviews and other relevant content as inputs for external media **Planned Result II.A: Strengthening ICO engagement with Members and other external stakeholders by providing a multi-sectorial leadership forum for dialogue and knowledge exchange on issues impacting the coffee sector:** • II.A.3 Consultations and advocacy to increase the engagement of ICO Members, private sector/other stakeholders in CPPTF and the realization of the Roadmap • II.A.9 Outreach programmes, special events and information materials **Planned Result III.A: Identification, development and fund mobilization of technical assistance and investment projects for exporting countries:** • III.A.5 Providing advisory services and cooperation with IGOs, private sector, civil society/academia

OVERVIEW

1. Conecta Agro Congress 2025

The Executive Director delivered a presentation entitled "From Seed to Cup: What can we expect in the future?". She addressed the current global geopolitical scenario and its influence on the coffee sector, production and consumption trends, studies on new genetics, and good practices to increase producer income.

2. 10th Cecafé Coffee Dinner & Summit

The Executive Director and Head of Operations participated in the opening and engaged with producers, exporters, industry associations, and international stakeholders. They also participated in discussions on future trends and sustainability initiatives, as follows:

(a) **Global coffee organizations panel:** The Head of Operations outlined the challenges of the EUDR's traceability requirements and highlighted opportunities for aligning georeferencing and legality systems, the uncertain impact of EU political and regulatory changes, the need for collective sector preparation for the 2028 review using a territorial approach, and Brazil's comparative advantage due to its strong data, regulatory framework and well-structured coffee sector.

(b) **Future of sustainable coffee growing panel:** The Executive Director reaffirmed the ICO's commitment to sustainability since the 1960s, discussed economic sustainability in high-price scenarios, emphasized social sustainability with decent income and human rights protection, and introduced circular economy concepts as opportunities for new business development and value creation.

(c) **Coffee summit side event - "Promoting decent work in the coffee sector: opportunities for cooperation":** This side event showcased significant progress in labour conditions on coffee farms. The Executive Director and Head of Operations joined discussions on decent work initiatives and cooperation opportunities in the coffee sector.

3. Technical field visits - Southern Minas Gerais

The Executive Director and Head of Operations took part in several technical visits at the invitation of Cecafé and the Brazilian Specialty Coffee Association (BSCA):

(a) **NKG Farmers Service Unit**: Exploration of NKG's producer-focused operations, NKG Verified sustainability protocols, and specialty coffee initiatives, with presentations by Chico Lentini, NKG's specialty coffee manager.

(b) **BSCA**: Comprehensive overview of the specialty coffee universe, quality competitions, Cup of Excellence programmes, sustainability in specialty coffees, certification processes, training programmes, and international promotion of Brazilian specialty coffees.

(c) **Fazendas Caxambu and Aracaçu**: Visits to farms owned by Carmen Lucia, BSCA President, in Três Pontas, to observe specialty coffee production details and sustainable practices implementation.

(d) **Cooxupé cooperative and small-scale producer**: Visit to one of Brazil's largest cooperatives, followed by a visit to a small-scale coffee producer with only 7 hectares to understand different production scales.

(e) **Exportadora Guaxupe**: Examination of sustainability protocols implemented by coffee exporters.

4. Institutional meetings

The Head of Operations and the Executive Director met with representatives from ECF, NCA, DKV, SCTA to assess their view of the Private Sector Consultative Board (PSCB) and/or collaboration with the ICO.

On 9 July 2025, the Executive Director conducted high-level institutional meetings in Brasília with key government and private sector entities:

(a) **National Coffee Council (CNC)**: meetings with private sector entities including Cecafé, ABICS, BSCA, ABIC, CNA and CNC to discuss industry collaboration.

(b) **Apexbrasil:** meeting with the President of Apexbrasil, Mr Jorge Viana, to discuss export promotion strategies.

(c) **Ministry of Agriculture (MAPA):** meeting with Agricultural Policy Secretary, Mr Guilherme Campos, who is responsible for *FUNCAFE* and the *Plano Safra* (Harvest Plan).

(d) **Brazilian Congress:** participation in the International Year of Cooperatives celebration.

CONCLUSIONS/MAIN OUTCOMES

Overall, the visit to Brazil facilitated extensive networking opportunities, knowledge exchange on sustainability practices, and strategic discussions to enhance ICO's engagement with Brazil's coffee sector and climate action initiatives.

1. Conecta Agro Congress 2025 and 10th Cecafé Coffee Dinner & Summit

The ICO reinforced its commitment to sustainability and addressed key challenges. The presentations strengthened the Organization’s leading position on future coffee sector trends and geopolitical influences.

2. Technical field visits - Southern Minas Gerais

The visits provided valuable insights into Brazil's specialty coffee ecosystem, from large-scale operations to smallholder farmers. Key learnings included:

(a) **Exporter competition** empowers farmers by offering flexible trade via digital platforms, credit, processing, cooperative profit-sharing, and broad access to training and innovation. Farmers are free to sell outside cooperatives.

(b) **Sustainability** is central to both exporter and farmer business models. All aspects are fully considered in business strategies: accounts, daily operations, pricing.

(c) **Farming as business**. Farmers of all sizes actively pursue profitability, marketing, and sustainability, seeking innovations through fairs, newsletters, and training, etc.

(d) **BSCA** has driven Brazil's specialty coffee growth, promoting smallholders, women, and youth while setting standards, protocols, and competitions.

(e) **Cooxupé**, the largest cooperative, combines exporting, risk management, processing, storage, farmer services, community support, and sustainability innovations, including circular economy practices. The ICO Secretariat will plan a session with Cooxupé staff to understand how they work.

(f) **Labour conditions** are a top priority. Specialty farms rely more on permanent or skilled labour; larger farms invest heavily in conditions. With the new due diligence regulations, EU importers co invest in improving labour conditions (financing mechanism: farmers and importers match grants and then go together to public banks for credit for further investment).

(g) **Mechanization** is expanding to reduce labour costs and improve precision (e.g., drones, irrigation, light harvesters). This alters planting patterns and can have environmental impacts, such as wider empty spaces between trees, but offsets labour shortages and costs.

(h) **Traceability systems:** Cooxupé and Guaxupé use EUDR-compliant data platforms and Serasa (Cecafé). Because of the higher demand for traceability, Cooxupé packs coffee more in 60-kg bags than in the large bags, complicating port logistics.

3. Institutional meetings

During the meetings between international private sector associations, the Executive Director and the Head of Operations, all associations acknowledged the ICO's crucial role in connecting importing and exporting countries with a strong sustainability focus, expressed support for the Executive Director's leadership, and identified cooperation areas including monitoring international policies, due diligence regulations, global coffee investments, sustainability collaborations, and compliance. The associations expressed other points of interest to be deepened in a further process to re-activate the PSCB together with all its members.

The high-level meetings in Brasília strengthened ties with Brazilian public and private stakeholders and reinforced Brazil's strategic importance as the ICO's largest Member country and a key partner in global coffee development initiatives.

AOB

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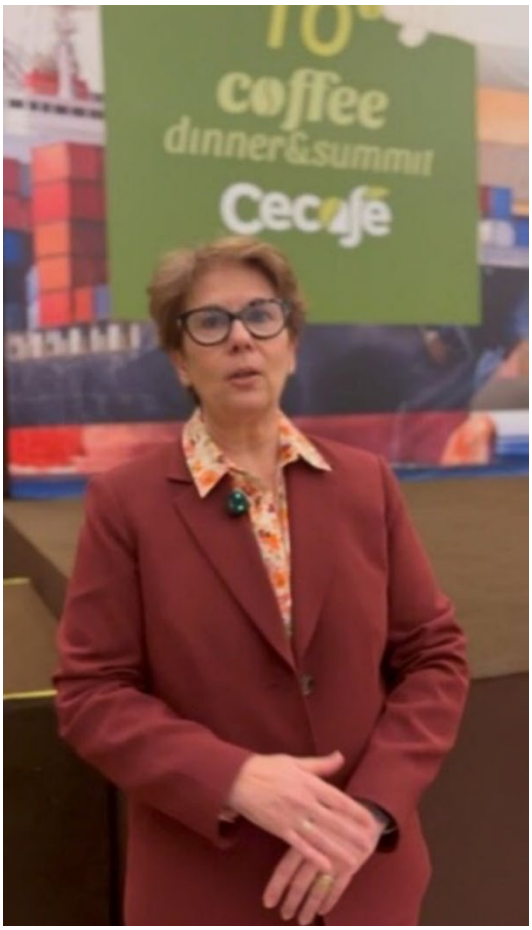
10º
coffee
dinner&summit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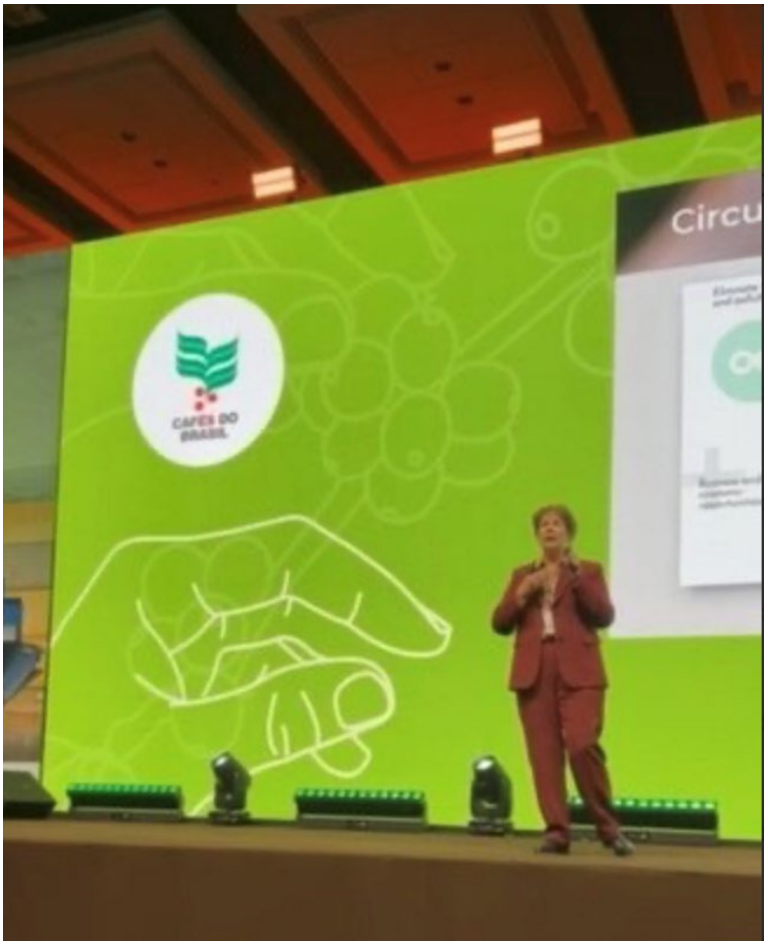
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